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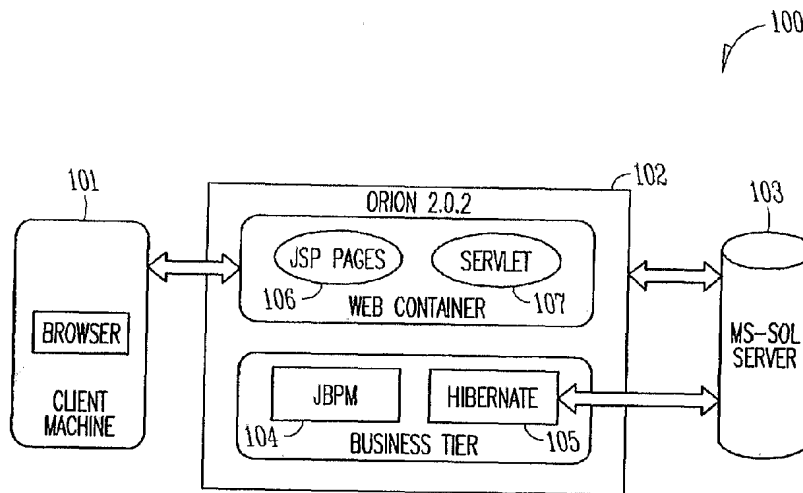
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(54) Title: SYSTEM AND METHOD FOR ANNUITY PROCESSING



(57) Abstract: The present invention provides a system, apparatus, and method for annuity processing. In some embodiments, an annuity processing module is used in conjunction with an internet-based patent- and trademark-application management system. This annuity-processing module reflects a software implementation of various business rules or methods associated with paying the annuity due on a patent. These rules are, in some embodiments, derived from various laws relating to the payment of annuities. In some embodiments, these rules are provided to a workflow engine via a DTD or XML schema. The workflow engine manages the execution of the various business rules and states associated with this execution. These rules, including the decision to make a payment, can be manually executed or automatically executed by a member of an organization implementing the annuity payment module as a part of a larger system. This larger application could, in some embodiments, be an internet-based patent- and trademark-application management system.

WO 2007/120649 A3



— *with amended claims*

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What is claimed is:

1. A method comprising:
receiving, on a client computer, notification of an annuity
5 payment due;
initiating a payment cycle on the client computer;
extracting annuity data from an internet-based patent- and
trademark-application management system;
transmitting the extracted annuity data to a server computer;
10 verifying the extracted annuity data against annuity data
contained on the server computer;
uploading a PDL to the client computer, and
sending extracting data and payment instructions to a server
computer.
15
2. The method of claim 1, wherein the server computer is owned by a
payment channel.
3. The method of claim 1, further comprising resolving a discrepancy
20 between the extracted annuity data and the annuity data contained on the server
computer.
4. The method of claim 1, wherein the sending of the annuity data and
payment instructions is initiated manually by a user.
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5. The method of claim 1, wherein the sending of the annuity data and
payment instructions is performed automatically by a work-flow engine.
6. The method of claim 5, further comprising providing the work-flow
30 engine an instruction set.
7. The method of claim 1, further comprising initiating the payment cycle
via a GUI.

8. A system comprising:

a first computer configured to receive instructions from second computer, wherein the instructions are inputted via a GUI;

5 a first software module operatively coupled to an internet-based patent- and trademark-application management system wherein the first software module extracts data from the internet-based patent- and trademark-application management system residing on the first computer;

a second software module operatively coupled to the internet-
10 based patent- and trademark-application management system that transmits the extracted data via an internet;

a third software module operatively coupled to the internet-based patent- and trademark-application management system that allows for uploading of a PDL; and

15 a fourth software module operatively coupled to the internet-based patent- and trademark-application management system that transmits the extracted data and payment instruction data.

9. The system of claim 8, further comprising a software module operatively
20 coupled to the internet-based patent- and trademark-application management system that resolves data discrepancies.

10. The system of claim 8, wherein the first computer is operatively coupled
via the internet to a third computer owned by a payment channel.

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11. The system of claim 8, wherein the transmitting of the data and the payment instructions data is initiated manually by a user.

12. The system of claim 8, wherein the transmitting of data and the payment
30 instructions data is performed automatically by a work-flow engine.

13. The system of claim 8, wherein the work-flow engine is provided with an instruction set.

14. A method for processing annuity data, comprising:
receiving, on a client computer, a notification of an annuity payment due
for one of a patent and trademark matter from a payment channel;
initiating a payment cycle for the matter on the client computer;
5 extracting annuity data for the matter from an application management
system on the client computer;
transmitting, over a network, the extracted annuity data from the
application management system to a payment channel;
verifying, at the payment channel, the extracted matter annuity data
10 against matter annuity data contained at the payment channel;
wherein the verifying comprises determining a discrepancy between the
extracted matter annuity data and the payment channel annuity data;
transmitting a payment decision list (PDL) from the payment channel to
the application management system,
15 wherein the transmitting includes transmitting the discrepancy data;
resolving, at the application management system, the payment channel
discrepancy data with the extracted matter annuity data; and
transmitting, over the network, payment instructions for the matter
annuity payment due to the payment channel.
20
15. The method of claim 14, wherein the transmitting a payment decision list
(PDL) by the payment channel comprises transmitting a notice of the
discrepancy data to the client computer.
- 25 16. The method of claim 14, further comprising transmitting, after said
resolving, a payment instruction and resolved matter annuity data for the matter
to the payment channel.
17. The method of claim 14, wherein the sending of the annuity data and
30 payment instructions is performed automatically by a work-flow engine.
18. The method of claim 14, further comprising resolving a discrepancy
between the extracted annuity data and the annuity data contained on the server
computer.

19. The method of claim 18, further comprising providing the work-flow engine an instruction set.
- 5 20. The method of claim 14, further comprising initiating the payment cycle via a GUI.